Irish Sea Issues and Opportunities

University of ULSTER

Irish Sea Issues & Opportunities

IRISH SEA MARITIME FORUM

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Acknowledgements

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Introduction

The Irish Sea Maritime Forum (ISMF) was launched in Belfast in June 2012. The Forum was established in response to a series of stakeholder workshops held in Liverpool and Dublin in 2011. ISMF is guided by a Steering Group which includes representatives from marine planning teams and relevant marine and coastal fora such as the Scottish Coastal Forum as well as other stakeholder interests from all six Irish Sea jurisdictions. It has received pump priming financial support from a range of organisations including Department of Environment, Northern Ireland, The Isle of Man Government and the Marine Management Organisation. Secretarial support is currently provided by the North West Coastal Forum and the University of Liverpool.

The Objectives of the Forum are:

- To provide a broad based forum for all Irish Sea users and provide an opportunity for voices to be heard
- To facilitate marine planning knowledge exchange and capacity building across all administrative areas and sectors
- To facilitate sharing of data and information
- To encourage and maintain political support for transnational partnership working in support of marine planning, with the aim of promoting sustainable development in the Irish Sea region.
- To facilitate a more coordinated, efficient planning process for transnational issues/ projects and good working relationships among Irish Sea partners

At the inaugural conference in Belfast, stakeholders suggested that an Irish Sea Issues and Opportunities paper would be a useful early output which could inform the direction of future Forum activities and forthcoming maritime planning in the region. A stakeholder workshop was therefore held in the Merseyside Maritime Museum in Liverpool in November 2012 to provide the basis of a draft paper. The event was open to all with an interest in the Irish Sea and was attended by over 60 delegates. The workshop focussed on the following themes: Fishing; Marine Energy; Ports and Shipping; Tourism and Recreation; and the Environment.

This draft Irish Sea Issues and Opportunities paper summarises the workshop outputs and results of wider stakeholder consultation. It provides a useful position statement in the first year of the operation of the Forum on stakeholders perspectives on key planning and management issues relating to this highly valued shared resource.

Fishing

Fishing

Current Situation

Fishing in the Irish Sea has a long history and still remains fundamental to the economic and social well-being of many rural coastal areas. In the past, the Irish Sea supported a large and varied fleet, which landed a diverse range of species. Offshore target species included; Cod, Haddock, Whiting, Pollack, Turbot, Mackerel, Herring, Sole, Halibut, Hake, Nephrops. Drastic declines in stocks of white fish species led to a sharp reduction in the number of vessels targeting them and many fishers moved to focus on Nephrops, otherwise known as Dublin Bay Prawns. The majority of larger vessels are now reliant on this single species. Other vessels have diversified into the scallop fishery for king and queen scallops. In-shore vessels focus mainly on Lobsters, Brown crabs and Velvet crabs. There is also a significant amount of shell fish aquaculture.

The majority of fishing effort is focused in the North West quarter of the Irish Sea, between Northern Ireland and the Isle of Man. Overall, fishing effort has declined over the last few decades, with the main exception being a large increase in dredging activity for scallops.

Key Policy Drivers

Fisheries management in the Irish Sea is driven primarily by the European Union's Common Fisheries Policy, or CFP, which aims to manage fish stock at sustainable levels. Common management tools include: restrictions on gear types, quotas limiting total allowable catch (TACs), restrictions on effort in the form of limited days at sea, and closed areas.

European Directives, such as the Habitats Directive and the Marine Strategy Framework Directive, are key drivers for management changes aimed at conserving marine ecosystems. In particular they facilitate the designation of marine protected areas in which fishing activities may be restricted. Whilst these areas have potential benefits for fisheries as well as conservation, there are stakeholder concerns about the site selection process and the potential impact of displaced effort.

Issues and Opportunities

The top three issues and opportunities are identified as:

Top three issues:

- Gaps in the knowledge
- Displacement of effort
- Communication

Top three opportunities

- Collaborative work/fishers in research 'win - win' MPAs
- Transfer of best practice
- Development of standardised methods

SWOT Analysis

The views of a diverse range of stakeholders are reflected in the following assessment of the strengths, weaknesses, opportunities and threats facing fishing in the Irish Sea.

Irish Sea stakeholders recognise the value of the fishing industry as an important employer, which directly and indirectly provides thousands of jobs and is of particular importance in rural areas, where it also has a strong cultural and social aspect. They also recognise its contribution to food security. Technological developments that enabled fishers to be more selective and reduce negative impacts on marine ecosystems are welcomed. The strength of the scallop fishery in the Isle of Man is cited as an example of how important the involvement of fishers is for developing successful management plans. In general, increased involvement of fishers in both the scientific and management aspects of fisheries is considered to be invaluable.

Strengths

- Mayor employer, particularly in rural areas
- Contribution to food security
- Rich culture associated with it
- Becoming more selective, reducing discards
- Development of gear modifications that reduce negative impacts on ecosystem
- Strong scallop fishery in the Isle of Man with extensive fisher input
- Strong Nephrops stocks in the Irish Sea
- Fishers extensive ecological knowledge
- Fishers becoming more involved in science
- Some areas 'adding value' to catch
- Local initiatives to be more sustainable
- Fishers changing perception/increased willingness to be involved

Weaknesses are highlighted under two main categories, science and management. There is a real concern over gaps in the data and a lack of investment in scientific research to fill them. And there is frustration with previous management failures and the continued lack of holistic planning.

Weaknesses

- Unfair quota system
- Gaps in the data
- Lack of investment in science
- Excessive lag time between knowledge and action
- Lack of joined up thinking and holistic planning
- Destruction of natural habitats and loss of biodiversity
- High dependency on a single species
- Mistrust
- The failure of the European Union's CFP to sustainably manage stocks

Stakeholders however perceive many opportunities, again focused mainly around improving research and management. Many possible 'win-win' situations can be identified, for example: MPAs with both conservation and fisheries benefits; involving fishers in science to both collect data and improve their understanding of management choices; co-location of renewable energy developments and some types of fishing. In particular stakeholders highlight the need for effective communication and cross-sector collaboration.

Opportunities

- Diversify
- Improve white fish stocks and reduce dependence on Nephrops
- Possibility of collocation of wind-farms and static fishing gear
- Involving fishermen in science and data collection
- Cross sector collaborative research
- Develop protocols so data sets are comparable standardise methods
- CFP reform
- Maximise the value of catch/adding value
- Involvement in marine renewable energy development
- Promotion of local seafood
- Win-wins, management measures that bring both conservation and fisheries benefits
- Change perceptions, get buy-in
- Development of integrated planning and management that take a holistic approach to marine management

They perceive threats associated with continued poor management, poor understanding and loss of ecosystem integrity.

Threats

- Inappropriate fisheries regulation
- Displacement
- Poor understanding/limited awareness of issues
- Climate change and varying weather patterns
- Defining sustainability - Is sustainability of stocks the same as sustainability?
- Loss of ecosystem resilience
- Biodiversity loss
- Invasive species
- High dependency on a single species
- Perceptions of other sectors

The above analysis provides a useful focus for future management discussions.

Conclusion

Irish Sea fisheries are an invaluable resource. Improvements to science and management seem necessary. Future work of the Forum could focus on improving communication and helping to fill data gaps by bringing different groups together and facilitating collaborative work. The Forum could also enable the development of standard methodologies and the sharing of best practices between the different sectors and administrations.

Commentary from Consultation

This draft Irish Sea Issues and Opportunities paper summarised the workshop outputs and was then circulated to stakeholders for a period of one month for wider input. We very much welcomed the comments that were received from Centrica Energy Upstream, Marine Scotland, the Irish Federation of Sea Anglers. The responses are summarised below.

Fishing

It was highlighted that consideration here should include Recreational Sea Angling (RSA) as well as commercial fisheries. Extensive commentary was provided in relation to the SWOT analysis from the RSA perspective which can help inform future ISMF activity in the area. In particular it was noted that due to recent legislative changes to the reformed Common Fisheries Policy (CFP) recreational fishing interests will be included as a consideration in fisheries management. RSA can be an important sector in the economic success of coastal communities as well as providing important social benefits and promoting wellbeing.

Energy

Energy

Current Situation

The UK leads the world in offshore wind development, with more than 700 turbines already installed (DECC, 2009). Within the Irish Sea, offshore wind energy is the most common form of marine energy, but there are other potential sources of marine energy, such as wave, tidal and even algae farming. Wave and tidal stream technologies are still at an early stage of development within the UK with around 4 MW prototypes currently undergoing testing in the UK. It is expected that wave and tidal energy will become operational within the next five to ten years, by 2020 (DECC, 2009). Several offshore wind farms are already in operation in the Irish Sea such as Walney (1&2, 67MW, 51 turbines), Barrow (90MW, 30 turbines), Burbo Bank (90MW, 25turbines) with a planned extension of 234MW (DONG Energy). It was recently announced that the First Flight Wind consortium (DONG Energy, B9 and RES) won the bid for delivering off shore wind facility off the south east coast of County Down with a potential generating capacity of 600MW.

Key Policy Drivers

In terms of the UK policy drivers and UK targets, under the Climate Change Act 2008, the transition to a low carbon economy requires 80% reduction in emissions by 2050 (34% by 2020). The Renewables Directive (2009) notes that 20% of total energy is required from renewables by 2020. In addition to the Directive, there is also the Low Carbon Transition Plan (DECC, 2009), Renewable Energy Strategy (DECC, 2009) and the Renewable Energy Roadmap (DECC, 2011). The roadmap shows the next critical stages in the wider deployment of wave and tidal devices, and support will be required for innovation, securing the investment funding for commercial demonstration, development of the supply chain and securing planning and consenting.

In relation to the development of policy and legislation, the Energy Bill was presented to the House of Commons on 29th November 2012. The Bill establishes a legislative framework for delivering secure affordable low carbon energy. Most notably it makes provisions for the Electricity Market Reform and the introduction of a policy strategy to improve regulatory and developer certainty. Commentators have welcomed the boost the Bill gives to investor certainty, demonstrating the need to decide how to improve energy efficiency and deliver real benefits. The Bill should move the current complex legislative landscape to a much simpler strategic approach. There is a clear need to ensure that the planning regime does not act as a barrier to the development of energy infrastructure.

Issues and Opportunities

The top three issues and opportunities are identified as:

Top three issues:

- Producing more data – reducing the knowledge gap
- Need better, more appropriate stakeholder engagement/ avoiding consultation fatigue
- Need for joined up thinking and alignment of the planning process – at the strategic level it is crucial to have MSP at top

Top three opportunities:

- Jobs creation and diversification in industry/Skills Development and Training/ Research Funding
- Investment and development of new technology in wave and tidal
- Delivery of Climate Change Mitigation - decarbonising the economy and opportunities for co-location

Energy SWOT Analysis

In terms of looking at the Irish Sea and Marine Energy the following SWOT analysis provides an overview of some of the opportunities and issues that were reported at the workshop.

The key headlines that seemed to come out of each section of the SWOT analysis centred around data collection and improving the evidence base to allow further development of marine energy, similarly with funding, research and training, the need for appropriate and meaningful community and stakeholder engagement, and the need for clear and streamlined legislation.

Strengths

- Wide availability and range of energy sources available, potential for developing new resources
- Climate change mitigation by offshore developments
- Security of energy supply – green industry which is low carbon, clean and renewable
- Job creation and diversification within existing industry – economic potential
- Provides university sector with research potential and potential for contributing to the existing knowledge base
- Currently developing cohabitation and collocation
- Irish Sea is a small area – conditions for a test bed – compared to the North Sea and sharing of best practice
- Good coordination of between eastern Irish Sea developers working together on joint survey work
- Contribution to existing knowledge base within the university sector and lots of research potential
- Political backing is evident
- Provides economic potential for the UK
- Environmental impact is positive

There were some instances where the SWOT produced inverts of strengths and weaknesses, for example it was appreciated that the Irish Sea is a relatively small area and therefore an excellent test bed for marine energy that allows for best practice. Yet, it was also noted that the Irish Sea is a very small area that could become overcrowded with marine energy devices with potential for displacement of other sectors.

Weaknesses

- Some activities are not compatible, e.g. energy installations v. aggregate extraction v. coexisting shipping routes v. bottom trawling v. cable laying – MSP should work to avoid conflicts
- MSP needs to be well resourced for promoting marine energy to gain appropriate data
- Small area of the Irish Sea, potential for more crowding and displacement of activities
- Lack of one coherent voice and clarity – 6 jurisdictions with their own legislation, timeframes, governance, co- dependencies
- Energy industry is competing with difficult resources and the cost of marine energy is competitive, more expensive than nuclear
- Unknown environment for marine energy – lack of evidence base for marine energy projects, lack of understanding for analysing data, standardising format of data
- Conflicts within stakeholders – there are occasions for stakeholders to be made statutory consultees
- For marine energy promotion the timing of marine planning legislation is too late, discussions should have been happening much earlier
- Risk of disjointment, inefficiencies in organisations in understanding the consenting process, results in a much slower planning process.
- EIAs for energy projects do not focus on most significant issues

Clearly the SWOT analysis is a useful exercise in directing thinking specifically towards marine energy in terms of the opportunities available.

Opportunities

- Reduced reliance on fossil fuels and delivery of climate change mitigation, decarbonising the environment, creating clean electricity
- To educate the public and stakeholders about what happens at sea and the potential of marine energy and planning
- Good news stories – needs to be much more positive press and marketing
- New energy infrastructure possibilities – wind farm + wave, wind + acquculture/mariculture, wind + solar
- Capture investment opportunities – improving energy technology – working with world leaders and experts
- In developing marine energy can use ancillary industries, e.g. fishing vessels are used for surveying, guard duties, tourism and cable laying – win win situation
- Stakeholders engagement can be more appropriate and meaningful between stakeholders, agencies and government
- Keep streamlining the planning process
- Continue to improve environmental understanding through data acquisition
- Scope for more scientific research and working more closely with research sector and industries to create better linkages, eg. need more research and knowledge into electromagnetic field
- Funding of research provides information for policymakers to produce regulation
- Co-location opportunities for developing energy installations in MPAs/MCZs

It seems to be appreciated that whilst this sector is a rapidly developing and exciting industry in terms of potential job creation and inward investment, there are still concerns in relation to the need to reduce the cost of energy and to reduce uncertainty in terms of developing further off-shore, to ensuring a more streamlined and efficient consenting and planning regime but also using stakeholders and their knowledge and skills to their fullest capacity.

Threats

- Difficulties in collecting evidence base
- Changes to funding regime is making renewable energy less attractive, question what will happen if funding dries up?
- Increasing health and safety concerns with energy development moving further offshore in terms of construction, development and operation
- Round III areas are much larger than previous, it is impossible to know the potential impacts
- Stakeholder fatigue
- Displacement of wind sector if change of policy will lead to an impact on capacity delivery
- Lack of a clear direction of travel – lack of a joined up approach from government – continual uncertainty of government decision making
- Misinformation in the press
- Unjustified restrictions on activities, should be evidenced based (remembering the precautionary approach)
- Marine energy is not a UK based industry, the resource is here but there is no manufacturing, developers will easily go outside of UK (to the East) if restrictions persist within regulations
- Training resources should not be focused soley on universities, need more developers working with existing contractors to take on more trainees for energy s kills training
- The Irish Sea as a whole cannot be partitioned off from the rest of Europe

Conclusion

It is clear from the above that there are both positive and negative responses in thinking about marine energy in the Irish Sea. However, importantly it has been established that there can be a role for the continued development of the Irish Sea Maritime Forum. In addition to the SWOT, there is a clear indication of a potential role for the future of the Irish Sea Maritime Forum in providing a coherent voice across all of the Irish Sea's 6 jurisdictions, and to produce a guidance document that takes account of what is/will happen across the Irish Sea in terms of legislation, policy and installations and future developments.

Commentary from Consultation

Marine Energy

It was noted that consideration here needed to extend beyond offshore wind and that oil& gas, nuclear, carbon capture, gas storage, LNG, and pipes and cables were all important in the Irish Sea. The potential multi functionality of wind farms and other energy related structures was also highlighted for example with the possibility of them providing micro-food webs and protection for immature fish through artificial reef creation.

Ports & Shipping

Ports and Shipping

Current Situation

Approximately 95% of the UK's and 99% of Ireland's total volume of import and export trade arrives by sea, making ports and shipping essential to economic wellbeing. The Irish Sea has historically been an important area for ports, shipping and shipbuilding activities, and continues to be so in the present day with several major ports, including Liverpool, Glasgow, Belfast and Dublin providing vital links for both passengers and goods between the UK, Ireland, Isle of Man and to mainland Europe and beyond. The sector also has an important role in some cases as a port authority – whether this is a privately or state-owned company - managing ports for a wide range of activities including freight, passenger transport and fisheries, as a land developer, dredging areas for port expansion and maintaining navigable waterways that can reach far inland, and in providing support vessels for offshore energy producers.

Key Policy Drivers

Ports and shipping policy is driven by two key sources: at the European level, Integrated Maritime Policy and more recently Blue Growth initiatives, which aims to support the maritime sector as a whole through removing administrative barriers to growth, encouraging research and innovation, and improving skills through education and training. In particular Blue Growth focuses on sectors with the greatest potential, the most relevant of these for the ports and shipping sector of the Irish Sea being coastal tourism and Short Sea Shipping. As a peripheral region of the European Union, the Motorways of the Sea network of strategic shipping routes has a dual role in providing part of the necessary infrastructure for international trade and also in helping to take freight off the roads, reducing congestion and promoting more sustainable transport.

At national level, the integration of maritime transport with road and rail transport to ensure efficient logistics chains for consumers and producers and maintaining security of energy supplies (shipping of oil, gas and biomass products and servicing offshore energy industries) is a key driver of ports policy and provides the backdrop to Ireland's Ports Policy Statement of 2005 and the UK's National Policy Statement for Ports (2012). However, there are also important social and environmental aspects to the port and shipping sector that must be taken into consideration, including the environmental impacts of shipping on both the marine environment and in terms of visual impacts, air quality, and the additional pressure placed on road networks by port development, plus potential benefits such as the improvement of local services and job creation.

Issues and Opportunities

The top three issues and opportunities are identified by stakeholders as:

Top three issues:

- The road / rail network connecting Irish Sea ports to the rest of the UK and Europe needs improvement.
- The complicated regulatory regime for port activities can delay new development.
- Cumulative effects of other sea-based activities have the potential to displace shipping – affecting routes and schedules. Integrated planning is required to minimise these effect.

Top three opportunities:

- Adaptation of ports to service new activities such as offshore wind farms.
- Increased tourism, either through cruise ship or leisure boating activities.
- Potential to benefit from increase in large container ships using the Irish Sea or increasing links to deep sea routes.

Ports and Shipping SWOT Analysis

The following SWOT analysis explores some of the strengths and opportunities of the ports and shipping sector for the Irish Sea, using stakeholder input from the ISMF.
The opportunities that have been identified recognise that the diversity of port infrastructure around the Irish Sea can support new activities or accommodate further expansion of existing activity. Port expansion, particularly in Liverpool, can enable greater connection to deep sea shipping routes, increasing imports/exports through Irish Sea ports.

Strengths

- Diversity of the Irish Sea port network in terms of port size and activities, such as container shipping, RoRo traffic, ferries, shipbuilding and repair or fishingports.
- Good local road and rail infrastructure servicing ports
- Presence of a skilled workforce already engaged in shipping and related activities.
- Continuing investment by port owners and shipping lines to improve facilities shows confidence in the region.
- Historical links between port cities and industries has created a shared cultural identity.

Whilst the improvement of infrastructure linking the Irish Sea region to the rest of the UK and Europe and the complicated regulatory regime for port development are issues that must be tackled at a national level, the cumulative effects of maritime development within each of the Irish Sea administrations are a felt to be a significant threat to the wider region.

Weaknesses

- There has been a lack of road and rail investment to ensure connectivity with rest of UK and Europe.
- The regulatory regime for port development is fragmented and requires negotiations with departments of transport, environment, planning etc. This takes time and is a costly process.
- Supply chains can be disrupted by bad weather, or in the longer term routes may be affected by new offshore developments such as wind farms.

The adaptation of ports to service the offshore wind sector is an activity that is already under way and can be developed further. Cruise tourism and leisure boating are perhaps under developed sectors, but the region's cultural heritage, natural assets and existing maritime infrastructure provide a solid base upon which new markets can be built.

Opportunities

- New investment in ports has spin-off benefits for regeneration of wider areas, job creation, and environmental improvements.
- Shipping could help to take goods traffic off roads.
- Emerging/growing industries such as offshore energy, cruise tourism.
- Port sites can be adapted to service the growing offshore energy industry.
- Leisure boating – new berths and marinas – could be a growth area with potential for Irish Sea destinations to take pressure off SW England
- New investment opportunities from the government(national and EU) and private sector.

Threats

- The seas are getting busier – there is greater competition between different sea users for space.
- Effects of economic recession – this can impact on demand for goods, causing a downturn in shipping and port activity. Slow housing market affects demand for aggregates.
- Uncertainty in regulatory process/changing rules – can hold up development and incur additional costs.
- Many ports privately owned - competition between ports in same region may affect balance of activity.
- Ability to maintain and improve environmental quality whilst pursuing growth.
- Ports in urban areas may lack space for expansion.

Conclusion

Overall, the ports and shipping sector offers a wide range of potential benefits. However, increasing use of the sea requires greater coordination between different administrations and sectors. The ISMF can act as a facilitator in some of this important work. The ISMF could take a leading role in bringing together stakeholders to inform them of developments that may have an effect on their own use of the Irish Sea, for example the further development of offshore wind farms may not only require alterations to main shipping routes crossing the Irish Sea but may affect small fisheries and recreational boating. Making stakeholders aware of such developments, enabling them to make contact with other stakeholders and engage in discussion about impacts for their sector may enable the identification of possible cumulative impacts and ways in which these can be minimised.

Commentary from Consultation

Ports and Shipping

It was suggested that this section could be renamed ‘Communications’ with air travel and electronic means also being critical to the Irish Sea region. The need to put safeguards in place to ensure that cargoes are fully risk assessed in case of grounding and potential pollution was noted. In addition the case for more slips and facilities for small boats in order to support increased recreational boating was highlighted.

Leisure & Recreation

Leisure and Recreation

Current Situation

According to the National Trust Coastal Values Survey of 2010 63% of those questioned regard visiting the seaside or coast as important to their quality of life. With around 6 million people living within 10km of the Irish Sea coastline and the region recognised as an established tourism destination, it is not surprising that the leisure and tourism sector probably contributes the most of all the maritime sectors to the Irish Sea regional economy. In 2004 the Irish Sea Pilot Study estimated that it generated approximately £2.5 billion (3.6 billion euros) per annum and directly employed between 100,000-200,000 people.

The region's resorts have been the traditional focus of the sector but visitor numbers to such destinations have tended to decline reflecting the changing nature of the recreation and tourism market. In its place there has been a growth in leisure and tourism associated with the Irish Sea's unique natural, maritime heritage including coastal walking, rock climbing, coasteering, sailing, powerboats, wind surfing, kite surfing, surfing, sea swimming, diving, angling, whale and dolphin watching, eco-trips and cruise tourism such as that increasingly associated with the Irish Sea's major city destinations of Dublin, Belfast, and Liverpool.

Key Policy Drivers

The significance of the sector to the social and economic life of the Irish Sea region is reflected in the prominence it has received in the region's INTERREG programmes. The Ireland and Wales and the Northern Ireland, Border Regions of Ireland and Western Scotland 2007 – 20013 programmes both identified tourism and marine and coastal leisure in particular as areas of growth potential which would benefit from cross border co-operation and development. Projects supported include the Irish Sea Marine Leisure Network, Celtic Wave which aims to facilitate the development of the cruise ship industry, various coastal and marine tourism projects lead by the Lough's Agency, and the Sail West strategic marine tourism initiative.

Looking to the future the European Union's Maritime Strategy for the Atlantic Ocean Area is likely to be a key policy driver for the sector. Under the theme of 'Socially Inclusive Growth', discerning tourism is identified as an area meriting ongoing support. The strategy identifies the need to attract all-year round trade in order to support quality jobs and sees the rough natural beauty, rich biodiversity, traditional seafood cuisine and Celtic culture of the region as key assets in the future development of the area. Nautical activities are considered to be an important source of future revenue and a creator of high-value jobs, however the region is judged to have a major deficit in berths especially for large recreational vessels in comparison to other European Seas.

Issues and Opportunities

The top three issues and opportunities are identified as:

Top three issues:

- Balancing development and environmental quality
- Providing the infrastructure to support sustainable leisure and tourism development
- Bringing people together in an effective way

Top three opportunities:

- Collating information on the region's leisure and tourism assets
- Better promotion of Irish Sea leisure and tourism offer
- Promoting a strategic approach to management

Leisure and Tourism SWOT Analysis

Reflecting the above, below is a stakeholder informed summary of the current strengths, weaknesses, opportunities and threats related to leisure and tourism in the Irish Sea.

The Irish Sea is an established tourism and leisure destination with a distinctive offer. It has a well developed leisure and tourism business sector which is an important source of jobs for coastal communities. There is also in many places a supportive structure of voluntary groups which plays a valuable role in caring for the environment and offering activities of interest to visitors. The Irish Sea benefits from being highly accessible with large populations living close by and due to its size offers easy hops between different destinations.

Strengths

- Established leisure and tourism destination with a distinctive/niche offer based around: *Environmen*t - wild weather, wild places, wildlife, Anglesey UNESCO Geopark, high quality landscapes around the Irish Sea; *Culture* – common Celtic Culture; and *Active leisure* - boating, coastal trails, water sports
- Established leisure and tourism sector supporting local businesses and jobs
- Established structure of local voluntary groups: Looking after the environment making the area look good so people are attracted in.
- Accessibility: A large number of people living close to the coast and It is a small sea and it is easy to hop around and see different places

The nature of the tourism offer is however not without its problems. These include concentration of activities within some areas leading to clash of user interests, degradation of the environmental quality upon which activities depend and ill developed and or outdated facilities. Lack of research on the value of the sector is compounded by poor representation of the sector in maritime fora. Overall it is considered that the Irish Sea suffers from inadequate and uncoordinated promotion of its leisure and tourism offer.

Weaknesses

- Problems with leisure and tourism offer include: resource depletion reducing leisure/tourism interest e.g. fish stocks and sea angling; Lack of safe harbours / anchorages; much of the Irish Sea not used for leisure/recreation; In N. Ireland solitary leisure pursuits associated with the coast affected by the troubles; clash of recreational interests in same area e.g. sand yachts/windsurfers/dog walkers/birds
- Problems with leisure and tourism sector include: resource depletion impacting on local economy; lack of research/evidence of the value of marineleisure; bureaucracy and red tape; and balancing economic and environmental interests.
- Problems with partnership structures include: too many forums in the Irish Sea; not easy to engage the leisure interest voices; lack of political interest
- Problems with accessibility include: disjointed access disjointed; underselling of leisure/tourism offer; and coastal management not always perfect and fragmented

Many opportunities exist to develop the sector and growth in marine tourism is predicted. Improved collaboration, more effective engagement with local communities and more coordinated marketing and development could bring significant benefits.

Opportunities

- Areas of increased demand include: growth in different sports that use the coast; marine leisure relocation from south coast (e.g. boating and sea angling); development of public right to fishing; windfarm ecosystems and sea angling opportunities; ecotourism/geotourism; sustainable tourism; re-naturalistation of the coast and new leisure/tourism opportunities
- Opportunities for improved collaboration include: better promotion of Irish Sea offer e.g. 'Living' Irish Sea concept promoting benefits of biodiversity; linking marine leisure routes and activities – sea and land and around the Irish Sea; environmental education linked to increased local group engagement; Irish Sea Maritime Forum can bring diverse fora together
- Other opportunities exist to generate revenue for local areas by increased connection to large populations living near the coast and event programmes raising the profile of Irish Sea

Threats to the future of the sector include the increasing intensity of human use of coastal and marine areas which may mean that leisure and tourism activities are compromised. Shortage of human and financial resources is also likely to be an ongoing challenge.

Threats

- Cultural Challenges include: changing youth interests and fall in outdoor activity?; and inward migration and collision of different cultural traditions and expectations
- Management Challenges include: managing marine leisure growth, is there capacity to cope e.g. harbours; windfarms and sea safety for small craft; over-popularity reducing quality of experience; unsustainable development damaging environmental assets e.g. invasive species and increased boat movement, disruption of movement of wildlife between protected sites, increased footfall can cause damage; coastal squeeze/climate change/coastal flooding/ difficulty in meeting new bathing water quality standards
- Resource Challenges include: lack of funding; cost of using facilities; too few human resources for the number of forums around the Irish Sea

Conclusion

The Irish Sea is a key focus for leisure and tourism activity and this is significant to the economic and social wellbeing of communities within and beyond the region. Future planning and management in the Irish Sea should support the sustainable development of tourism and leisure opportunities and a coordinated approach across jurisdictional boundaries. The Irish Sea Maritime Forum can play a role bringing relevant stakeholders together, collating information on the region's leisure and tourism assets and encouraging a strategic approach to leisure and tourism promotion and management.

Commentary from Consultation

Leisure and Recreation

In terms of opportunities for the Irish Sea the linkages between port and shipping development and emerging and growing industries such as offshore energy and cruise tourism were highlighted. While in relation to weaknesses it was acknowledged that tensions between recreational interests in the same area e.g. dog-walking and sand yachting could occur, however at the same time it should be noted that marine sectors are interdependent as they share common skills and shared infrastructure. It was also suggested that it was often important to make best use of existing infrastructure rather than providing [new/more] infrastructure and efforts should be made to tap into research that explored contiguous related activity such as wildlife and nature tourism. In addition it was felt that there are opportunities for developing RSA tourism given its sustainability and low impact to the marine environment.

Environment

Environment

Current Situation

The Irish Sea has a wide and diverse coastal and marine environment including many priority habitats including Sabellaria alveolata reefs, Estuarine rocky habitats, saltmarshes, seagrass beds, Fragile sponge and anthozoan communities on subtidal rocky habitats, horse mussel beds and mearl beds. There are also many priority species present including invertebrates, fish, priority marine mammals such as the basking shark and bottlenose dolphin are found in significant numbers in the Irish Sea and marine birds including the red throated diver, great northern diver, storm petrel, leach's petrel sandwich tern and common tern all of which are listed on Annex I of the Birds Directive. However the 2010 Quality Status Report produced by OSPAR highlights continuing threats to the Celtic Sea Region (which includes the Irish Sea) associated with eutrophication, pollution from hazardous substances; excessive fishing pressure and the direct and indirect impacts associated with increasing demands for marine space and resources by shipping, renewable energy, coastal defence and mineral extraction.

Key Policy Drivers

This rich biodiversity has a variety of legislation aimed at managing and protecting it. Much of this stems from the UN Convention on the Law of the Sea (UNCLOS); the UN Convention on Biological Diversity and the Convention for the Protection of the Marine Environment of the North-East Atlantic (The OSPAR Convention). Consequently, an increasing range of marine species and habitats is being given protection. For example the EC Birds Directive provides a framework for the conservation and management of, and human interactions with, wild birds in the Irish Sea and other areas. Work is underway under the UK's Marine and Coastal Access Act to establish network of marine conservation zones in the Irish Sea and to improve the planning for the competing range of activities in UK waters and complementary activity is also underway in The Isle of Man. There is the EU's Common Fisheries Policy which is currently undergoing reform with the aim of bringing fishing and fish stocks to sustainable levels. The Marine Strategy Framework Directive encourages the development of integrated programmes to achieve Good Environmental Status in Europe's seas by 2020. The Directive sets out 11 high-level Descriptors of Good Environmental Status which cover all the key aspects of the marine ecosystem and all the main human pressures on them and encourages transnational working in regional seas. However, with these and other policies come challenges of their own due to the fact that the Irish Sea has six jurisdictions interpreting and implementing them.

Issues and Opportunities

The top three issues and opportunities are identified as:

Top three issues:

- Multiple jurisdictions interpret/apply environmental policy differently resulting in a system that lacks coherence.
- Lack of or lack of access to baseline data.
- Lack of clear objectives for spatial management with decisions regarding spatial management suffering from a limited evidence base

Top three opportunities:

- Central online database for Irish Sea environmental data.
- Collate policy and legislation to identify and highlight regional differences and conflicts with a view to encouraging more cross-border collaboration.
- Identify goals and aims for each MPZ (doesn't have to be a single goal for all MPZs).

Environment SWOT Analysis

Reflecting the above, below is a stakeholder informed summary of the current strengths, weaknesses, opportunities and threats related to the environment in the Irish Sea.

Stakeholders identified that the Irish Sea was a rich and diverse marine environment. Concerns were not focused on a particular environmental problem e.g. protection of a particular species or environment, pollution, fishing pressure etc. but the problems identified are focused on the managerial and policy difficulties and weaknesses which give rise to the following primary issues and opportunities being identified.

Strengths

- A rich and diverse marine environment
- Many priority species present in the Irish Sea.
- Many priority habitats present in the Irish Sea.

Whilst there is an MPS in place that sets and aligns the marine policy direction across the various administrations at a UK level some participants felt that the problem of multiple jurisdictions is a source of real concern. The way that laws and policy are interpreted differently across the region seems confusing and a barrier to the development of cohesive spatial management. It also means that policy is often unaligned in neighbouring areas creating confusion and a perception that management decisions are based on limited evidence which creates a lack of confidence in the decision makers.

Weaknesses

- Lack of baseline data; difficulty accessing data sources; insufficient data resolution. Data deficiency leads to a monitoring approach rather than a proactive approach.
- Stakeholder issues related to environmental management include: ownership – currently the emphasis seems to be on a top down approach; poor stakeholder involvement e.g. public consultations often happen after planning has taken place.
- Six borders present across the Irish Sea; Each jurisdiction interprets environmental frameworks and laws independently and differently; Unaligned policies meaning that spatial planning is not coherent across the region.
- Poor communication between stakeholders and authorities and between different jurisdictions.
- Stakeholders cannot see any clear objectives for Marine Protected Zones (MPZs) and feel that decisions are based on insufficient evidence.
- Focus on inshore areas. Offshore areas neglected.

The Forum could collate information on how Directives are being interpreted and applied. This would highlight the areas of difference and increase awareness of this issue with the relevant government departments.

Opportunities

- Provision of a central online database for environmental data. Identify data gaps and influence research to focus on these /encourage data sharing.
- Improved stakeholder representation through better advertisement, direct contact and encouragement of early stakeholder participation.
- The Forum could encourage integration between multiple jurisdictions by collating policy and legislation; identifying regional differences and potential conflicts and facilitating common interpretation of EU regulations.
- The Forum could act as voice of stakeholders to communicate with authorities and create a platform for cross-jurisdiction communication.
- The Forum could identify goals and aims for each MPZ (doesn't have to be a single goal for all MPZs) and support an evidence based approach.
- It could identify data gaps for the offshore environment and encourage research in these areas.

The perception of the majority of stakeholders is that there was a lack of baseline environmental data on the Irish Sea. However it is evident that a lot of data is collected from environmental impact assessments. It is felt that the Forum could encourage the development of a database of this information that is more easily accessible and knowledge gaps can be more easily identified. Delegates felt that there was a lack of clear objectives for marine conservation zones and strengthening of the supporting evidence base was needed.

Threats

- Pollution
- Over-fishing
- Industrial use – energy, aggregates, shipping etc.
- Coastal development

Conclusion

Overall stakeholders are positive about the role that the Forum could take in addressing some of these key issues and that if these processes were stakeholder led rather than top-down managed then compliance and stakeholder involvement would increase. A key role for the Forum was identified as assisting in the development of goals for the MPZs and collating evidence. Where evidence is lacking this knowledge gap should be highlighted and research encouraged.

Commentary from Consultation

Environment

It was highlighted that the risks of non native species were often closely linked to shipping activity with ferry and other shipping routes potentially acting as vectors for spread of species. In relation to baseline data, it was noted that much information is available but there would be merit in having a unified source and that the ISMF could potentially take the lead in this role.

Appendix 1

Irish Sea Issues and Opportunities Workshop List of Delegates

David Annett	University of Liverpool
Emily Baxter	Cumbria Wildlife Trust
Graham Bench	Cheshire West and Chester Council
Rachel Bowes	Natural Power Consultants
Prof. Cynthia Burek	University of Chester/Cheshire RIGS
Philip Cheek	Cheshire Wildlife Trust
Flo Clucas	Leadership Group, Atlantic Forum
Peter Cushion	Wirral Council
Dr Lyndsey Dodds	WWF UK
Frances Edwards	
John Entwistle	Wirral Council
Rhona Fairgrieve	Scottish Coastal Forum
Jamie Gardiner	Royal HaskoningDHV
Rachel Goodwin	Environment Agency
Jim Green	Friends of the Estuary Coastal Care Group (Lytham)
Dr Jonathan Green	University of Liverpool
Meg Green	Friends of the Estuary Coastal care Group (Lytham)
Garry Gregg	Irish Federation of Sea Anglers
Nigel Hamilton	Copius Resources / MCNI
Louisa Higby	Bangor University
Davey Hill	Anglo North Irish Fish Producers Organisation
Natalie Hold	Bangor University
Elizabeth Hopley	Natural England
John Howarth	National Oceanography Centre
Dr Lara Howe	Cefas
Dr Stephen Jay	University of Liverpool
Dr Alan Jemmett	Merseyside EAS
Jennifer Kelly	Relevant Authorities Group for Cardigan Bay SAC
Sue Kidd	University of Liverpool
Dr Joel Kimber	CMACS Ltd
Hilmar Kimz	Bangor University
Helen Kirk	National Trust
Kate Lawty	Morecambe Bay Partnership
Dr Kirsty Lindenbaum	Countryside Council for Wales
Chris Lumb	Natural England
Warren Marshall	Peel Ports
Peter McEvoy	Isle of Man Government
Dr Lynne McGowan	University of Liverpool
Phil Megson	Lancashire County Council
Jed Nicholson	Natural England
Katharine Nisbet	Natural England
Daniel Parkes	University of Liverpool
Andrew Prior	DONG Energy
Wu Qia	University of Liverpool
Laura Raggatt	ERM
Clare Reed	Royal Society for the Protection of Birds
David Reed	Irish-sea.org Marine Leisure Federation
Clare Regnart	Member of the Public
Dr Heather Ritchie	University of Ulster
Matt Robson	Jacobs UK Ltd
Phil Robson	University of Liverpool
Caroline Salthouse	North West Coastal Forum
Rohan Smith	Marine Ecological Surveys Limited
Sarah Jayne Smith	Belfast City Council
Eleanor Stone	Manx Wildlife Trust
Lindsay Sullivan	North West Wildlife Trusts
Patrick Timko	Bangor University
Gero Vella	RES Offshore
Paul Vertigen	Warwick Energy Ltd
Frank Weston	Boskalis Westminster Limited
Nicola Whalley	UCLAN
Dr Judith Wolf	NOC
Katherine Yates	University of Ulster

Further Information

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A pdf of the report is available to download from the Irish Sea Maritime Forum website: www.irishseamaritimeforum.org

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